

This Page Is Inserted by IFW Operations  
and is not a part of the Official Record

## **BEST AVAILABLE IMAGES**

Defective images within this document are accurate representations of the original documents submitted by the applicant.

Defects in the images may include (but are not limited to):

- BLACK BORDERS
- TEXT CUT OFF AT TOP, BOTTOM OR SIDES
- FADED TEXT
- ILLEGIBLE TEXT
- SKEWED/SLANTED IMAGES
- COLORED PHOTOS
- BLACK OR VERY BLACK AND WHITE DARK PHOTOS
- GRAY SCALE DOCUMENTS

**IMAGES ARE BEST AVAILABLE COPY.**

**As rescanning documents *will not* correct images,  
please do not report the images to the  
Image Problem Mailbox.**

Set	Items	Description
S1	328	(FINANCIAL? OR FISCAL? OR MONEY OR MONIES OR MONETARY OR P- ECUNIARY OR BANK) (2N) (ACCOUNT? ? OR RECORD? ? OR LOG OR LOGS - OR BANKBOOK? OR BALANC?)
S2	2533	CODED OR PROGRAMMED OR PREPROGRAMMED OR INSTRUCTED OR CONF- IGURED OR PREDETERMINED OR PRESET
S3	5814	CLOSE?? OR CLOSING OR CLOSURE? ? OR FOLD? OR SHUT()DOWN OR CONCLUDED OR ENDED OR ENDING OR TERMINAT?
S4	2714	REASON? ? OR EXPLAIN? OR EXPLANATORY OR JUSTIFICATION?
S5	69	("NOT" OR UN) (2N) S3
S6	0	S1 AND S4 AND S5
S7	0	S1 AND S5
S8	0	S1 AND S2 AND S3
S9	18	S1 AND S3
S10	1	S1 AND S4 AND (S2 OR S3 OR S5)

9/5/1

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

01746606 DOCUMENT TYPE: Product

**PRODUCT NAME: BusinessVision 32 (746606)**

BusinessVision Management Systems Inc (484211)  
4100 Main St #300  
Philadelphia, PA 19127 United States  
TELEPHONE: (215) 508-3452

RECORD TYPE: Directory

CONTACT: Sales Department

BusinessVision 32 from BusinessVision Management Systems is a complete accounting system for Windows platforms. Modules include Accounts Receivable, Accounts Payable, General Ledger, Purchase Order, Payroll, Sales Analysis, Order Entry, Budgets & Forecasts, Purchase Analysis, and Job Costing. BV 32 is tightly integrated with Microsoft (R) Office. The system features automatic posting that eliminates outdated entries and the need for month-end batching of transactions. All modules automatically create the required journal entries. Invoices and purchase orders automatically calculate effects on other accounts, as well as the costs, taxes, and freight charges. The AR system offers special features such as drill-down to general ledger; calculation and verification of discounts; links to GoldMine's contact manager; direct customer e-mails; account histories with five configurable aging periods; flagging and linking functions for multiple-item payments; territory codes; sales tax calculations, including Canadian sales taxes; and user-defined search key. The AP module also supports 1099 forms; ability to view closed purchase orders; and partial payments and on-account payments. The general ledger accommodates 40,000 accounts with 1-5 digit format account IDs, with unlimited transactions per account. Journal entries can list 198 transaction lines per entry. GL reports include income statement, balance sheet, comparative performance, and bank reconciliation. Inventory Control lets users browse stock codes and item descriptions; track vendor part numbers and costs by item; and control inventory for multiple warehouses. Inventory supports two tax indicators for billing, 25-character serial numbers, 15-character stock codes, and fractional inventory.

DESCRIPTORS: Accountants; Accounting; **Accounts Payable; Financial**  
Reporting; General Ledger; Inventory; Job Costing; Payroll; Purchase  
Orders; Sales Analysis

HARDWARE: IBM PC & Compatibles

OPERATING SYSTEM: 1-2-3; Excel; Windows; Windows NT/2000; Windows XP

PROGRAM LANGUAGES: Not Available

TYPE OF PRODUCT: Micro

POTENTIAL USERS: Cross Industry, Accountants

PRICE: Available upon request

OTHER REQUIREMENTS: 32MB RAM; Win 9x+ required

REVISION DATE: 20020313

9/5/2

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

01486175 DOCUMENT TYPE: Product

**PRODUCT NAME: General Ledger System 7.0 (486175)**

Legler Systems Co (567183)

23 Charles Hill Rd  
Orinda, CA 94563 United States  
TELEPHONE: (925) 254-1264

RECORD TYPE: Directory

CONTACT: Sales Department

General Ledger System 7.0 supports multiple users in an online environment. The printed reports include voucher edits, account of detail reports, working trial balance, chart of **accounts**, **financial** statements (user-defined), operating reports, journal **closing**, account adjustments, and budgets. The online screen displays include a query of a specific journal voucher; all vouchers for an accounting period; and pop-up help windows. The free demo disk shows the user-friendly operational and control features of the system including laser printer support. The definition of line items in the financial statements is user-defined by the Code Definition Record (DB System). The separate actual and budget amount fields are defined for each account-department combination in the Account Master Record for faster processing when printing financial reports. The system supports user control of month-end **closing** by executing a separate online procedure.

DESCRIPTORS: Accountants; Accounting; Financial Reporting; General Ledger;  
Small Business

HARDWARE: IBM PC & Compatibles; IBM RS/6000  
OPERATING SYSTEM: AIX; DOS; NetWare; Windows; Windows NT/2000  
PROGRAM LANGUAGES: COBOL  
TYPE OF PRODUCT: Mini; Micro; Workstation  
POTENTIAL USERS: Accounting, Cross Industry, Small and Midsize Businesses  
DATE OF RELEASE: 12/1991  
PRICE: \$1,295 and up; source code available at additional cost; demo disk available; includes support

DOCUMENTATION AVAILABLE: Reference manuals; user manuals; source code;  
online documentation  
TRAINING AVAILABLE: On-site training; technical support; telephone support  
SERVICES AVAILABLE: Consulting; conversion; custom programming  
REVISION DATE: 20020127

9/5/3

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

01263249 DOCUMENT TYPE: Product

PRODUCT NAME: **FUND Accounting 14.0 (263249)**

Cougar Mountain Software Inc (332411)  
7180 Potomac Dr  
Boise, ID 83707 United States  
TELEPHONE: (208) 375-4455

RECORD TYPE: Directory

CONTACT: Sales Department

FUND Accounting 14.0 is a six-module, fully integrates system for nonprofits that includes General Ledger, Accounts Payable, Payroll, Purchase Order, Check Reconciliation and LYNX (ASCII file converter). Optional modules of Accounts Receivable, Order Entry/Invoicing and Inventory are also available. LYNX provides an interface between Cougar Mountain Software and various databases and spreadsheets. General Ledger allows for multi-company ledgers with or without consolidation of financial

reports. Users can define the fiscal calendar within the parameters of one to 13 accounting periods. Users can continue processing ledger transactions through two accounting periods into the next financial year before closing the ledger. Accounts Payable provides the ability to examine the status of a single vendor with the option to print a paper copy at any time. It can distribute to 250 general ledger expense accounts per invoice. Invoices can be processed by invoice number or voucher number. User-defined sales tax tables with over 200 separate sales tax codes are supported. Payroll handles multi-company payrolls and allows the automatic preparation of payroll transactions. It allows for the distribution of payroll expenses to user-designated departments. Check Reconciliation can write computer-generated checks from among 10 user formatted styles. Data from handwritten checks can also be processed.

DESCRIPTORS: Accounting; Accounts Payable; Financial Reporting; Fund Accounting; General Ledger; Nonprofits; Payroll; Purchase Orders; Purchasing

HARDWARE: IBM PC & Compatibles  
OPERATING SYSTEM: DOS  
PROGRAM LANGUAGES: Not Available  
TYPE OF PRODUCT: Micro  
POTENTIAL USERS: Non-Profit Organizations  
PRICE: \$2,499.50; \$3,499.50--multi-user version

OTHER REQUIREMENTS: 640K RAM, hard drive required  
REVISION DATE: 19990629

9/5/4

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

01263231 DOCUMENT TYPE: Product

PRODUCT NAME: ACTPlus Accounting 12.1 (263231)

Cougar Mountain Software Inc (332411)  
7180 Potomac Dr  
Boise, ID 83707 United States  
TELEPHONE: (208) 375-4455

RECORD TYPE: Directory

CONTACT: Sales Department

ACTPlus Accounting 12.1 is a professional quality accounting series of completely integrated programs. LYNX is an ASCII file converter that provides an interface between Cougar Mountain's software and various databases and spreadsheets. General Ledger allows for multi-company ledgers with or without consolidation of financial reports. Users can define the fiscal calendar within the parameters of one to 13 accounting periods. Users can continue processing ledger transactions through two accounting periods into the next financial year before closing the ledger. Accounts Payable provides the ability to examine the status of a single vendor with the option to print a paper copy at any time. It can distribute to 250 general ledger expense accounts per invoice. Invoices can be processed by invoice number or voucher number. User-defined sales tax tables with over 200 separate sales tax codes are supported. Payroll handles multi-company payrolls and allows the automatic preparation of payroll transactions. It allows for the distribution of payroll expenses to user-designated departments. Check Reconciliation can write computer-generated checks from among 10 user formatted styles. Data from handwritten checks can also be processed. Accounts Receivable allows for up to 15 alphanumeric account numbers, open item and/or balance forward accounts, multi-accounts within a company, unapplied payments and unapplied

credit memos and users to design six different statement formats. Order Entry allows for billing of non-stock items and nested sales taxes to provide for state, local and other sales tax rates. Inventory supports LIFO, FIFO, weighted average, or standard cost methods for valuation of inventories. It allows 30 to 45-character stock descriptions and for up to four decimal places past the decimal point for cost and price. The Financial Analysis Module reports on the financial well-being of the company with over 30 indicators.

DESCRIPTORS: Accounting; Accounts Payable; Accounts Receivable;  
Financial Reporting; General Ledger; Inventory; Order Entry; Payroll;  
Purchase Orders; Small Business

HARDWARE: IBM PC & Compatibles  
OPERATING SYSTEM: DOS  
PROGRAM LANGUAGES: Not Available  
TYPE OF PRODUCT: Micro  
POTENTIAL USERS: Small to Medium Sized Business  
PRICE: \$399.50; \$599.50--2-user; \$799.50--4-user; \$1,499.50--250-user

DOCUMENTATION AVAILABLE: User manuals; online documentation  
OTHER REQUIREMENTS: 640K RAM; hard disk required  
REVISION DATE: 19990629

9/5/5

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

01090956 DOCUMENT TYPE: Product

PRODUCT NAME: Accounts Payable (090956)

Datamar Software (530751)  
500 Fesler St #207  
El Cajon, CA 92020 United States  
TELEPHONE: (619) 579-8244

RECORD TYPE: Directory

CONTACT: Sales Department

Datamar Software's Accounts Payable system combines streamlined menus and lookup features for accounts with full general ledger integration. Users can approve items for payment by vendor, due date, or discount date. They can automate recurring payable entries, and sort information by date, check number, vendor, account number, and other fields. Users can reconcile multiple checking or savings accounts and enter manual checks, with or without a transaction wash-through. The payables account can be modified after posting. AP automatically distributes to ledger accounts. The payables account can be modified after posting. New vendor codes and general ledger accounts can be added on-the-fly. In addition, the system prints checks on any standard blank stub check, laser checks, or laser printers, and offers simple purge and close options. Accounts Payable reports include Payable Status, Cash Requirements, 1099's, Vendor Labels, Vendor History, Vendor Aging, and Recurring Payments.

DESCRIPTORS: Accounts Payable; Accounts Receivable; Bank Statement  
Reconciliation; Check Writing; Purchase Orders; Small Business

HARDWARE: IBM PC & Compatibles  
OPERATING SYSTEM: Windows; Windows NT/2000  
PROGRAM LANGUAGES: Not Available  
TYPE OF PRODUCT: Micro  
POTENTIAL USERS: Cross Industry, Small to Medium-Size Businesses  
PRICE: Available upon request

TRAINING AVAILABLE: Technical support  
REVISION DATE: 020724

9/5/6

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

01090921 DOCUMENT TYPE: Product

**PRODUCT NAME: General Ledger (090921)**

Datamar Software (530751)  
500 Fesler St #207  
El Cajon, CA 92020 United States  
TELEPHONE: (619) 579-8244

RECORD TYPE: Directory

CONTACT: Sales Department

General Ledger from Datamar Software combines budgeting, financial reporting, accounting, multicompny financials, and much more. The system boasts easy to use menus and lookup for accounts, codes, and vendors. New account codes can be easily added. Other features of DataMar's General Ledger include multilevel password protection; double entry bookkeeping; account histories; multicompny **financials** ; batch posting; no formal monthly **closing** required; user defined chart of accounts; and extensive error-handling. Tapping DataMar, users can define their own account number rules and set up department codes. They can budget by periods, manage up to 999 billion transactions and 99 companies, reconcile checking accounts, and post to earlier accounting periods. Reports include trial balances, deposit histories, Balance Sheet, General Ledger Activity, Transaction Journal, Disbursement Journal, and Check Register.

DESCRIPTORS: Accounting; Bank Statement Reconciliation; Budgeting;  
Financial Reporting; General Ledger; Small Business

HARDWARE: IBM PC & Compatibles  
OPERATING SYSTEM: Windows; Windows NT/2000  
PROGRAM LANGUAGES: Not Available  
TYPE OF PRODUCT: Micro  
POTENTIAL USERS: Cross Industry, Small to Medium-Size Businesses  
PRICE: Available upon request

TRAINING AVAILABLE: Technical support  
REVISION DATE: 020724

9/5/7

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

01007615 DOCUMENT TYPE: Product

**PRODUCT NAME: MAGIC for Windows (007615)**

irs-aims (320668)  
PO Box 2576  
Universal City, TX 78148 United States  
TELEPHONE: (210) 658-4691

RECORD TYPE: Directory

CONTACT: Sales Department

General Ledger from Datamar Software combines budgeting, financial reporting, accounting, multicompany financials, and much more. The system boasts easy to use menus and lookup for accounts, codes, and vendors. New account codes can be easily added. Other features of DataMar's General Ledger include multilevel password protection; double entry bookkeeping; account histories; multicompany financials ; batch posting; no formal monthly closing required; user defined chart of accounts; and extensive error-handling. Tapping DataMar, users can define their own account number rules and set up department codes. They can budget by periods, manage up to 999 billion transactions and 99 companies, reconcile checking accounts, and post to earlier accounting periods. Reports include trial balances, deposit histories, Balance Sheet, General Ledger Activity, Transaction Journal, Disbursement Journal, and Check Register.

DESCRIPTORS: Insurance; Insurance Agencies; Pricing; Property & Casualty Insurance

HARDWARE: 80386; 80486; IBM PC & Compatibles; Pentium

OPERATING SYSTEM: NetWare; Windows; Windows NT/2000

PROGRAM LANGUAGES: COBOL

TYPE OF PRODUCT: Micro

POTENTIAL USERS: Texas Property and Casualty Insurance Agents and Companies

DATE OF RELEASE: 03/1979

PRICE: \$1,500 and up; annual licensing fee required; upgrade pricing

DOCUMENTATION AVAILABLE: User manuals; online documentation

TRAINING AVAILABLE: On-site training

REVISION DATE: 20030228

9/5/8

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.

(c)2003 Info.Sources Inc. All rts. reserv.

00143501 DOCUMENT TYPE: Review

PRODUCT NAMES: Company--Ameritrade Inc (866997); Company--E\*TRADE Group Inc (864684)

TITLE: E-Trading Hangs On: Virtual brokerages Ameritrade and E-Trade...

AUTHOR: Cuneo, Eileen Colkin

SOURCE: Information Week, v918 p43(4) Dec 9, 2002

ISSN: 8750-6874

HOME PAGE: <http://www.informationweek.com>

RECORD TYPE: Review

REVIEW TYPE: Company

The topic is very different strategies used by Ameritrade and E\*TRADE for expanding their virtual brokerage offerings. E\*TRADE is moving past basic online discount brokerage services by adding banking, loan, insurance, and advisory services, while Ameritrade is staying closer to its brokerage business while seeking expansion of market share as the number of online competitors shrinks and the number of active traders drops. Ameritrade reported \$431 million in revenue for the fiscal year ending September 27, 2002, and in April announced intentions to acquire Datek Online Holdings. Both companies had positive cash flows, little debt, and were steadily profitable. Datek had technology that Ameritrade wanted to offer, and both have incrementally changed the Datek Web site metaphor to make it more closely mirror Ameritrade's. Datek customers now have access to Ameritrade's suite of reports and alerts, which allow customers to receive selected market by e-mail, text-ready cell phone, or pages. By spring 2003, Ameritrade plans to meld its own and Datek's account-clearing companies to one system and to put order routing and management on one platform. E\*TRADE



has expanded quickly, and has purchased 18 non-competing companies in the last three years. E\*TRADE Bank debuted in 2000, and E\*TRADE Mortgage became available in 2001. E\*TRADE has opened financial centers in SuperTarget retail stores through a partnership with Target. Over half of new bank accounts and 30 percent of new mortgages come from its brokerage customers.

COMPANY NAME: Ameritrade Inc (658057); E\*TRADE Group Inc (621376)  
SPECIAL FEATURE: Graphs  
DESCRIPTORS: Business Models; Investment Management; Online Stock Trading; Stock Brokers  
REVISION DATE: 20030330

9/5/9

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00130949 DOCUMENT TYPE: Review

PRODUCT NAMES: Venture Capital (839612)

TITLE: Venturing Onward: Some enterprises are still investing in tech...  
AUTHOR: Hicks, Matt  
SOURCE: eWeek, v18 n21 p53(4) May 28, 2001  
ISSN: 1530-6283  
HOMEPAGE: <http://www.eweek.com>

RECORD TYPE: Review  
REVIEW TYPE: Product Analysis  
GRADE: Product Analysis, No Rating

Although major corporations for quite a while have been 'making billions of dollars in venture capital or incubation investments in IT startups,' Coca-Cola has been late to the party and is now playing catch-up. However, as dot-coms fail and IPOs diminish in number, many corporations that were investing a few years ago are now becoming very stingy with new investment money. Companies still willing to bet on new technologies include Coca-Cola, The Dow Chemical Company, Boeing, J P Morgan Chase & Company, and Chevron. They are continuing or increasing venture investments in technology startups. These investors, however, are in for the long term and are investing in technologies that will be critically important in guaranteeing competitive edge. The e-business leaders in these companies are ensuring that their venture capital arms are closely aligned with the needs of the business, so that they can 'strike the right balance between financial returns and strategic goals.' For instance, Coca-Cola's venture unit, which is called Fizzion, received about 100 business plans since launch and continues to evaluate many technologies relevant to Coca-Cola's business, including distribution, logistics, and electronic marketing applications. Fizzion's strategy is to give startups with physical space and up to \$250,000 each. A matching amount of funding from other private investors must also be on the table.

COMPANY NAME: Vendor Independent (999999)  
SPECIAL FEATURE: Graphs  
DESCRIPTORS: Manufacturing; New Economy; Venture Capital  
REVISION DATE: 20011130

9/5/10

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00128733 DOCUMENT TYPE: Review

PRODUCT NAMES: ASP (Application Service Providers) (841242)

**TITLE: On Shaky Ground: After offering complex services at low prices...**

**AUTHOR: Maselli, Jennifer**

**SOURCE: Information Week, v825 p22(2) Feb 19, 2001**

**ISSN: 8750-6874**

**HOMEPAGE: <http://www.informationweek.com>**

**RECORD TYPE: Review**

**REVIEW TYPE: Product Analysis**

**GRADE: Product Analysis, No Rating**

Customers of application service provider (ASP) HostLogic, which filed for bankruptcy and shut down operations recently, learned the following hard lesson: putting critical applications in the hands of small ASPs can be very treacherous. Others facing possible disruption as small ASPs face hard times can only hope that their ASP will be acquired, as AppliCast was by Agilera. The lower-cost ASP business model is difficult to sustain, and analysts expect more ASPs to go out of business or be acquired in the near future. According to Gartner Group, an IT advisor, 50 percent of about 500 currently operating ASPs are likely to go out of business in 2001. One ASP customer facing disruption and significant lost time is Tyco International, which chose HostLogic for its low cost. Tyco, which still believes the ASP model is a good one, may seek the services of another ASP, but before signing on will check the chosen ASP's financial balance sheets. Tyco's next ASP choice would have to show sufficient cash to become profitable without requiring more funding. However, few ASPs can claim that ability, and Tyco may have to give the job of implementing SAP applications to one of its own divisions. One ASP that was not chosen by Tyco is Corio, which charges more than competitors. Because it is expected to break even by the end of 2001, Corio could be a survivor in the ASP industry.

**COMPANY NAME: Vendor Independent (999999)**

**DESCRIPTORS: ASP (Application Service Providers); Business Models; E-Commerce**

**REVISION DATE: 20020227**

**9/5/11**

**DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.**

**(c)2003 Info.Sources Inc. All rts. reserv.**

**00125918**

**DOCUMENT TYPE: Review**

**PRODUCT NAMES: CaseWare Working Papers (713104); Accountant's Trial Balance 3.0 (208523); GoSystem Audit (758272); ePaceENGAGEMENT (020915); ProSystem fx Audit (444987)**

**TITLE: Trial balance helps firms realize full potential**

**AUTHOR: Davis, Tom C, CPA**

**SOURCE: Accounting Today, v14 n12 p26(6) Jul 10, 2000**

**ISSN: 1044-5714**

**HOMEPAGE: <http://www.electronicaccountant.com>**

**RECORD TYPE: Review**

**REVIEW TYPE: Product Analysis**

**GRADE: Product Analysis, No Rating**

CaseWare International's CaseWare Working Papers, Creative Solutions' Accountant's Trial Balance 3.0 and GoSystem Audit, ePace! Software's ePace! Engagement, and CCH's CCH ProSystem fx Audit are trial balance applications whose basic functions include financial statement preparation, links to tax applications, and creating and managing supporting workpapers. CaseWare Working Papers has many features that most vendors do not offer. These include integrated document management, write-up, trial balance, report generation, and links to other applications. CaseWare Working Papers also prepares ratio analysis and variance workpapers. Accountant's Trial Balance

(ATB) for Windows uses wizards to help with the setup process. Its file folder layout, used to access system information, is similar to Excel and Lotus. There is a built-in word processor for preparing engagement documents and reports; tax information can be exported to supported tax packages. GoSystem Audit is evolving into a comprehensive workpaper application with features that support the integration with other applications. Epace! Engagement will completely integrate the trial balance, workpaper, and financial statement preparation functions with Microsoft's Word and Excel applications. ProSystem fx Audit, previously called AuditVision, is the trial balance component of CCH's ProSystem fx Office application. CCH is going to add significant Web-based capabilities to all components of the suite in the coming year.

COMPANY NAME: CaseWare International Inc (621196); Creative Solutions Inc (497789); RIA (550621); ePace! Software (689254); CCH Inc (545147)  
DESCRIPTORS: Accountants; Accounting; Financial Reporting; General Ledger; IBM PC & Compatibles; Professional Service Automation; Windows  
REVISION DATE: 20020923

9/5/12

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00123646 DOCUMENT TYPE: Review

PRODUCT NAMES: Account Aggregators (842401)

TITLE: Show Them The Money : Account Aggregators Attract Customers...  
AUTHOR: Le Beau, Christina  
SOURCE: Industry Standard, v3 n18 p210(4) May 15, 2000  
ISSN: 1098-9196  
HOMEPAGE: <http://www.thestandard.com>

RECORD TYPE: Review  
REVIEW TYPE: Product Analysis  
GRADE: Product Analysis, No Rating

Yodlee, VerticalOne, and other account aggregators/screen scrapers, allow consumers to view banking, investment, and billing statements from one World Wide Web site, irrespective of the institutions or companies from which the viewed accounts originate. However, account aggregators gather information without obtaining permission from financial organizations since they log on as the customer, pull out the data, and take the data back to the aggregator's site. Although some banks have sued aggregators, others found out that banks could do the same thing, and probably more effectively. Larger banks have aggregation plans on the table and see opportunities in the information that might tempt customers to transfer balances, refinance loans, or buy new products. About 800,000 consumers will use aggregators' services in 2000, but the number should be much higher by 2002, and by then every large bank and brokerage will likely offer its own aggregation either alone or as a partner to a portal or aggregator. The two financial service providers closest to providing aggregation services are Ameritrade and FleetBoston. First Union, however, has taken a different track, with plans to provide aggregation by the end of the year while suing aggregator Paytrust and providing guidelines for companies that 'scrape First Union accounts.'

COMPANY NAME: Vendor Independent (999999)  
SPECIAL FEATURE: Graphs  
DESCRIPTORS: Banks; E-Banking; Financial Institutions; Personal Finance; Portals; Stock Brokers  
REVISION DATE: 20010430

9/5/13

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00122459 DOCUMENT TYPE: Review

PRODUCT NAMES: MYOB Accounting Plus 9 (695505); Peachtree Complete Accounting 7.0 (011451); PROFIT GOLD 4.0 (671401); QuickBooks Pro 2000 (585904); Simply Accounting 7.0 (017809)

TITLE: Bookless Bookkeeping

AUTHOR: Yakal, Kathy

SOURCE: PC Magazine, v19 n5 p178(10) Mar 7, 2000

ISSN: 0888-8509

HOME PAGE: <http://www.pcmag.com>

RECORD TYPE: Review

REVIEW TYPE: Review

GRADE: A

MYOB's MYOB Accounting Plus 9, Peachtree Software's Peachtree Complete Accounting 7.0 (the editors' choice), Champion Business Systems' Profit 4.0, Intuit's QuickBooks Pro 2000, r:\evolution 2001, Netledger 2.0, and ACCPAC International's Simply Accounting 7.0 are compared small business accounting packages. Basic features provided include accounts payable and receivable; order, inventory, and time billing management features; general ledger; analysis and reporting tools; and payroll. Peachtree gets the nod for its excellence in every evaluation category, including an excellent interface and unusually good help and tutorials. Standard features are well-implemented and powerful, and the PeachLink add-on is the only product in the comparison that provides an integrated e-store solution. MYOB Account Plus 9 is a close runner up, with excellent accounting tools and very easy-to-use interface. With the addition of some robust e-commerce tools, MYOB could be a strong competitor to Peachtree. QuickBooks Pro 2000 is also a good choice, but its help files and some features, including orders and inventory, cannot compete with Peachtree's or MYOB's. QuickBooks Pro is the only product that provides online banking, and Peachtree and QuickBooks are the only products that interface with third-party e-commerce solutions. Peachtree supports Web-based and electronic ordering, and combines bricks-and-mortar with online business and electronic payments, and QuickBooks supports electronic ordering. Only r:\evolution 2001 can post concurrently to multiple companies, and only MYOB and Simply Accounting 7.0 provide a report writer.

COMPANY NAME: MYOB US Inc (315885); Peachtree Software Inc (129241); Champion Business Systems Inc (347671); Intuit Inc (447013); ACCPAC International Inc (649775)

SPECIAL FEATURE: Screen Layouts Buyers Guides

DESCRIPTORS: Accounting; Accounts Payable; Accounts Receivable; Financial Reporting; General Ledger; IBM PC & Compatibles; Payroll; Small Business

REVISION DATE: 20030221

9/5/14

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00116700 DOCUMENT TYPE: Review

PRODUCT NAMES: Y2K (836567)

TITLE: Y2K: Should You Worry?

AUTHOR: Van Winkle, William

SOURCE: LAPTOP Buyer's Guide & Handbook, v18 n9 p126(8) May 1999

ISSN: 2089-036X

HOME PAGE: <http://www.bedfordmags.com>

RECORD TYPE: Review  
REVIEW TYPE: Product Analysis  
GRADE: Product Analysis, No Rating

A discussion of Y2K dangers puts the many potential disasters described in the press and from other resources in proper perspective. Symantec's Norton 2000 is highlighted as a product that provides data-scanning to check files, applications, and hardware for noncompliance problems on PCs. These risks can cause financial losses, liability, and incompatibility with systems used by company staff, customers, clients, and partners. Computing product makers may have to reduce production for a while to a certain extent, but predictions of 'a severe worldwide recession,' as predicted by Ed Yardeni, chief economist of Deutsche Bank Securities, are most likely exaggerations. Many people are concerned about problems with **bank accounts**, and in the worst case bank failures could occur if people begin needlessly stock-piling cash. The bank industry, which is rigidly monitored and operates under many government regulations, has the best Y2K preparedness of any business group. Several large banks' activities are described. Utilities, which are also **closely** regulated, are likely to have short, sporadic outages that will not last even days, and no interviewed utilities expect major problems. Appliance glitches caused by embedded devices are divided into low, medium, and high risk categories, with security systems reporting to a maintenance center, irrigation systems, PDAs, and fax machines at the high end, since they are heavily dependent on calendars.

COMPANY NAME: Vendor Independent (999999)  
SPECIAL FEATURE: Screen Layouts Charts  
DESCRIPTORS: Computer Equipment; Embedded Systems; Laptops; Mobile Computing; Project Cost Estimating; Risk Analysis; Y2K  
REVISION DATE: 20021130

9/5/15

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00100060 DOCUMENT TYPE: Review

PRODUCT NAMES: Planning Workbench (652601); Empac (652628); Plant & Equipment Maintenance (652636); Protean Maintenance (569348); MAXIMO (470147)

TITLE: Keep in Condition: High-tech innovations clear path toward integ...  
AUTHOR: Dilger, Karen Abramic  
SOURCE: Manufacturing Systems, v15 n1 p38(5) Jan 1997  
ISSN: 0748-9488  
HOMEPAGE: <http://www.manufacturingsystems.com>

RECORD TYPE: Review  
REVIEW TYPE: Product Analysis  
GRADE: Product Analysis, No Rating

TSW International's Planning Workbench and Empac, J D Edwards' Plant & Equipment Maintenance, Marcam's Protean Maintenance, and Project Software & Development's PSDI's MAXIMO are examples of products supporting integrated plant maintenance. Such tools are widely used in the highly automated process industries where management systems are multifunctioned, interconnected plantwide systems that enhance productivity, cut costs, and increase efficiency. Integrated tools allow maintenance operations to exchange information in near real time with inventory, scheduling, purchasing, financials, and project management systems. For some plants with **closely** integrated, sophisticated management processes, the maintenance system becomes a genuine enterprise system. Proactive management allows scheduling of planned on time to reduce emergency

maintenance situations, and issues that must be addressed include the need for corrective, preventive, and predictive maintenance. Planning Workbench provides one interface for system scheduling, planning and administration, and Empac integrates with Oracle **financials**, purchasing, and **accounts payable**. J D Edwards offers a capacity planning tool that helps manage labor costs, and Plant & Equipment Maintenance provides a user-friendly graphical user interface (GUI). Advantis.Pro is based on Protean, an ERP product, and creates an object-oriented (OO) user interface.

COMPANY NAME: Indus International Inc (543063); J D Edwards & Co  
(351989); Marcam Corp (240800); MRO Software Inc (064963)  
SPECIAL FEATURE: Screen Layouts Charts  
DESCRIPTORS: Equipment Maintenance; Industrial Automation; Maintenance  
Management; Manufacturing; Scheduling  
REVISION DATE: 20011224

9/5/16

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00072335 DOCUMENT TYPE: Review

PRODUCT NAMES: **BusinessWorks 9.0** (014396)

TITLE: **BusinessWorks Brings You Closer to Your Customers**  
AUTHOR: DePasquale, Ellen  
SOURCE: PC Magazine, v13 n22 p54(1) Dec 20, 1994  
ISSN: 0888-8509  
HOMEPAGE: <http://www.pcmag.com>

RECORD TYPE: Review  
REVIEW TYPE: Review  
GRADE: A

Manzanita Software's BusinessWorks PC 9.0 has more than 100 enhancements for integration and reporting, placing it at the top of the midrange accounting package arena. DOS and Windows versions are available, both comprised of accounting function modules, and files from the two are compatible. This release also uses expanded or extended memory to speed up data access and search. Pop-up notes for customer, vendors, part numbers, and other items help add contact management functions. Reporting functions are excellent, with General Ledger producing income statements for particular periods; Accounts Payable has reports for bank reconciliation. Employee review and attendance can be tracked, and Order Entry creates invoices from quotes. Menus are in standard English, and documentation is very good. No support for foreign currencies is provided.

PRICE: \$995

COMPANY NAME: Best Software Inc (112178)  
SPECIAL FEATURE: Screen Layouts  
DESCRIPTORS: Accounting; **Accounts Payable**; DOS; **Financial Reporting**;  
General Ledger; IBM PC & Compatibles; Order Entry; Small Business;  
Windows  
REVISION DATE: 20020930

9/5/17

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00065914 DOCUMENT TYPE: Review

PRODUCT NAMES: **MacMoney 4.01** (000329)

**TITLE:** MacMoney 4.01  
**AUTHOR:** Negrino, Tom  
**SOURCE:** Macworld, v11 n7 p83(2) Jul 1994  
**ISSN:** 0741-8647  
**HOMEPAGE:** <http://www.macworld.com>

**RECORD TYPE:** Review  
**REVIEW TYPE:** Review  
**GRADE:** A

MacMoney 4.01 is recommended as an easy to learn and use personal finance package for users with the most basic money management needs. The product has good graphing and reporting features, including pre- and custom-designed graph styles. MacMoney now allows the user to add a 13th month at the end of a year, for receipt of and paying bills, or to pull together other year-end data for **closing** out the year. Split transactions can now have up to 25 destination categories, and handle up to 30,000 records a year. The user can assign long payee names, and use up to 1000 categories, Names, and ID codes for group transactions. Automatic transaction enhancements include editing, many **bank account** types, and data import from Quicken, CheckFree e-payment services, and Aatrix Payroll. However, MacMoney does not send data to CheckFree, as Quicken and Managing Your Money can.

**PRICE:** \$90

**COMPANY NAME:** Survivor Software Ltd (423408)  
**SPECIAL FEATURE:** Screen Layouts  
**DESCRIPTORS:** Apple Macintosh; Bank Statement Reconciliation; MacOS; Personal Finance  
**REVISION DATE:** 20001130

9/5/18  
DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00061677            **DOCUMENT TYPE:** Review

**PRODUCT NAMES:** CryptoMactic 1.0.1 (456411)

**TITLE:** CryptoMactic 1.0.1  
**AUTHOR:** Steinberg, Gene  
**SOURCE:** Macworld, v11 n2 p81(1) Feb 1994  
**ISSN:** 0741-8647  
**HOMEPAGE:** <http://www.macworld.com>

**RECORD TYPE:** Review  
**REVIEW TYPE:** Review  
**GRADE:** B

Kent\*Marsh's CryptoMatic 1.0.1 is security software that lets users quickly and easily encrypt documents such as **financial records**, personnel files, or trade information. The package places a small circle on the menu bar, and users highlight files, **folders**, or disks, and select Encrypt or Decrypt from the pull-down menu, or with a keyboard command. Its five encryption schemes range from a fast LightningCrypt to Triple DES (Data Encryption Standard, based on an ANSI scheme). Self-decrypting files can be sent with a password to users without the software, so they can decode them. An Incinerate option destroys a file by overwriting it on the disk, making it unrecoverable. Aside from a few quirks and some encryption schemes that are not completely immune to hackers, the package provides effective protection to sensitive data.

**PRICE:** \$99

COMPANY NAME: Kent\*Marsh Ltd (449474)

DESCRIPTORS: Apple Macintosh; Computer Security; Encryption; File Security  
; MacOS

REVISION DATE: 20001130



10/5/1

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

00089070 DOCUMENT TYPE: Review

PRODUCT NAMES: One-Write Plus 5.0 (007829)

TITLE: One-Write Plus Provides Basic Bookkeeping at a Low Price

AUTHOR: Yakal, Kathy

SOURCE: PC Magazine, v15 n6 p45(1) Mar 26, 1996

ISSN: 0888-8509

HOME PAGE: <http://www.pcmag.com>

RECORD TYPE: Review

REVIEW TYPE: Review

GRADE: A

NEBS Software's low-priced ONE-WRITE PLUS ACCOUNTING System 5.0, the first Windows release of the product (for Windows 3.1 or later) remains as streamlined as the DOS release. A comprehensive tutorial shows the user how to construct a firm's books and **explains** other tools. Users answer questions, and ONE-WRITE PLUS designs a custom- **configured** listing of setup procedures. Users can also just set up the books without any help, using a setup checklist and the Setup menu. Detail shown in the transaction screens lacks the depth of some competing products, but the program makes financial tasks for small businesses quick and easy. It writes checks, sends bills and invoices, establishes budgets, and tracks Accounts Payable, Accounts Receivable, and Payroll. Users can also maintain the General Ledger and reconcile **bank accounts** . Dozens of preconfigured reports are provided.

COMPANY NAME: Peachtree Software Inc (129241)

SPECIAL FEATURE: Screen Layouts

DESCRIPTORS: Accounting; Accounts Payable; Accounts Receivable; Billing;  
General Ledger; IBM PC & Compatibles; Payroll; Small Business; Windows

REVISION DATE: 20021226